

Monthly Case Worker Contacts

Note: In order to create a case note, an assignment to the case is not needed. Additionally, a case note can be created on a closed case.

Introduction:


The following guide walks through how to enter a case note to meet the Federal mandate on monthly case worker contacts with children and juveniles in out of home care. The following five data criteria must be met in order for a face-to-face contact to be included in the count of those submitted for federal reporting purposes:

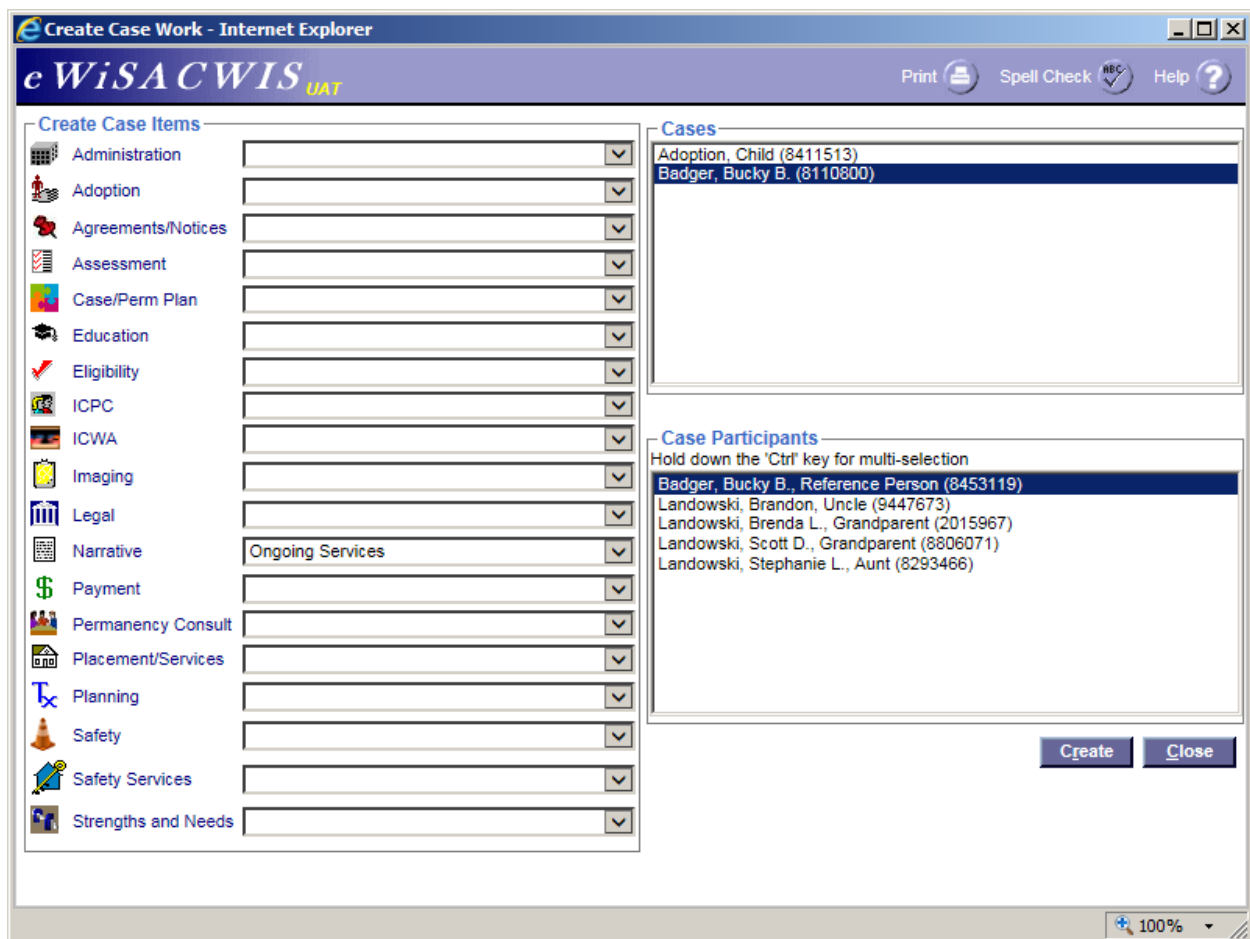
1. To count as a successful case worker contact for a particular month, the Date on the case note must be during that calendar month.
2. To count as a successful case worker contact for a particular child, that child **MUST** be selected as a participant on the case note.
3. You may choose any Category (except Fiscal) and the Type **MUST** be 'Face-to-Face' (or 'Initial Face-to-Face' which is only available in the Initial Assessment and Ongoing categories).
4. The case note **MUST** have a value selected for the Face-to-Face Location drop-down. Select 'Out of Home Care' when visiting the child where he or she is currently placed.
5. To count as a successful caseworker contact, the Face-to-Face Result drop-down must have 'Occurred' as the selected value.

Documenting Monthly Case Worker Contacts:

Creating Case Notes on Assigned Cases

1. Create a case note using one of three methods:

- a) From your desktop, click the Case Work hot button  to open the Create Case Work page.
- Select the Category from the Narrative drop-down.
 - Select the Case.
 - Selection of Case Participants is optional. Use the 'ctrl' key to select more than one participant.
 - Click Create to open the Case Notes page.



Create Case Work - Internet Explorer

eWiSACWIS UAT Print Spell Check Help

Create Case Items

- Administration
- Adoption
- Agreements/Notices
- Assessment
- Case/Perm Plan
- Education
- Eligibility
- ICPC
- ICWA
- Imaging
- Legal
- Narrative
- Payment
- Permanency Consult
- Placement/Services
- Planning
- Safety
- Safety Services
- Strengths and Needs

Cases

- Adoption, Child (8411513)
- Badger, Bucky B. (8110800)

Case Participants

Hold down the 'Ctrl' key for multi-selection

- Badger, Bucky B., Reference Person (8453119)
- Landowski, Brandon, Uncle (9447673)
- Landowski, Brenda L., Grandparent (2015967)
- Landowski, Scott D., Grandparent (8806071)
- Landowski, Stephanie L., Aunt (8293466)

Create **Close**

100%

- b) From the desktop, click the [Actions](#) hyperlink next to the case to open the Actions pop-up page.

[Create](#)
[Maintain](#)
[Utilities](#)
[Adoption Search](#)
[Help](#)

Worker Bee's Desktop

☒ Date Restricted
 ☐ Participant View
 ☐ View Not Approved/Cancelled

Ticklers

My Ticklers

Escalated Ticklers

Cases (17)

[Bird, Baby \(9223840 \)](#)
[Actions](#)

Subsidized Guardianship 02/03/2014 Supervisor, Test Ashland - Ashland 122 Highland Ave , Ashland, WI 5

[Bird, Kid \(9223480 \)](#)
[Actions](#)

Subsidized Guardianship 06/13/2012 Supervisor, Test Ashland - Ashland 123 Robin Egg St , Ashland, WI 5

[Bird, Mom \(9223460 \)](#)
[Actions](#)

CPS Family - Ongoing 06/22/2013 Supervisor, Test Ashland - Ashland 122 Cardinal Way , Ashland, WI 5480

[Frost, Mom \(9223680 \)](#)
[Actions](#)

CPS Family - Initial Assessment 10/07/2013 Bee Worker SRO-DCFS-Madison 123 Winter Way , Madison, WI

Click to Create Case Related Work

[Holly, Buddy \(9223001 \)](#)
[Actions](#)

Pre-Adoptive Child 05/01/2012 Worker, Jenny SRO-DCFS-Madison

[Mayl, Mother \(9223380 \)](#)
[Actions](#)

CPS Family - Ongoing 04/19/2013 DefaultWorker, Columbia Waukesha - HHSD 123 Field Rd , Waukesha, WI

[Pearl, Mom \(9223580 \)](#)
[Actions](#)

CPS Family - Ongoing 06/25/2013 Supervisor, Test Ashland - Ashland 123 Main St , Ashland, WI 54806

[Qi, Mikey \(9223500 \)](#)
[Actions](#)

Pre-Adoptive Child 02/22/2013 Bee, Worker WRO-DCFS-Eau Claire 321 1st St , Ashland, WI 54806

[Qi, Mom \(9223441 \)](#)
[Actions](#)

CPS Family - Ongoing 06/20/2013 Bee, Worker Ashland - Ashland 1422 2nd St , Ashland, WI 54806

[Schools, Mom \(9223620 \)](#)
[Actions](#)

CPS Family - Initial Assessment 08/23/2013 Bee, Worker SRO-DCFS-Madison

[SG, Daughter \(9222484 \)](#)
[Actions](#)

Subsidized Guardianship 06/07/2011 Bee, Worker State Central Office 123 Aphid Trail , Madison, WI 53701

[SG, Son \(9222483 \)](#)
[Actions](#)

Subsidized Guardianship 06/07/2011 Bee, Worker State Central Office 123 Aphid Trail , Madison, WI 53701

[Slacks, Mimmy J. \(9222336 \)](#)
[Actions](#)

CPS Family - Initial Assessment 06/16/2010 Kiel, Robert Dane - East 3813 Evergreen Terr , Madison, WI 537

[Smith, Mom \(9223180 \)](#)
[Actions](#)

CPS Family - Ongoing 10/24/2012 Kiel, Robert Vilas - Social Services

[Spider, Fuzzy \(9222061 \)](#)
[Actions](#)

c) From Search, click the [Actions](#) hyperlink next to a case name.

The screenshot shows the eWiSACWIS UAT Search page. The browser address bar displays the URL: <https://apps.dcf.wisconsin.gov/?action=OPEN&fromWhere=desktop>. The page has a navigation bar with tabs: Case, Person, Provider Organization, and Worker. The Search Criteria section includes fields for Last Name (frost), First Name (mom), Case ID, Site, and ZIP Code. There are checkboxes for Date Restricted, Participant View, and View Not Approved/Cancelled. A Search Precision slider is set to Med, and the Sort By dropdown is set to Alpha. A Search button is present. Below the search criteria, it says 'Record 1 to 1 of 1'. The Cases Returned section shows a single case: 'Frost Mom (9223680)' with an 'Actions' link circled in red. The case details include: CPS Family - Initial Assessment, Status: Open, 10/07/2013, Bee, Worker, Adoption Unit Supervisor, SRO-DCFS-Madison, 123 Winter Way, Madison, WI 53701. A Close button is at the bottom right.

Select the Create Case Note radio button and click Continue to open the Case Notes page.

The screenshot shows the eWiSACWIS UAT Select Action page. The browser address bar displays the URL: https://apps.dcf.wisconsin.gov/?action=OPENSECONDLINK_S.... The page has a navigation bar with tabs: Case, Person, Provider Organization, and Worker. The Select Action section contains a list of radio buttons: Archival- Request Retrieval, Case Note Criteria Search, Create Case Note (selected), Create Meeting, Print Case Record, and View Ticklers. There are Continue and Close buttons at the bottom right.

- On the Case Notes page, select the appropriate values as noted below. Hover the cursor over the Details flair next to Face-to-Face Location and in the Narrative section for Caseworker Contact policy guidance.

The screenshot shows the eWiSACWIS UAT web application interface. The top navigation bar includes the application name and various utility links like Print, Spell Check, and Help. The main form is titled 'Case: Frost, Mom (9223680)' and contains several sections:

- Case Information:** Includes Case Note ID, Date Entered (05/15/2014 10:33 AM), and checkboxes for Note Finalized and Contact By Designee (labeled B).
- Note Information:** Contains fields for Date (05/01/2014, labeled A), Begin Time (10:00 AM), End Time (00:00), Duration (0000.0), and a Billable checkbox. It also has dropdown menus for Category (Ongoing Services, labeled C), Type (Face-to-Face), Type Detail, Face-to-Face Location (Out of Home Care), and Face-to-Face Result (Occurred).
- Participants:** A list of participants including Frost, Dad (Present Spouse), Frost, Jack (Bio Child), Frost, Kid (Bio Child), and Frost, Mom (Reference Person). The first participant is highlighted (labeled D).
- Narrative:** A large text area for entering the note, with a 'Details' link next to the Case Note 1/1 header.

At the bottom of the form are buttons for 'Insert Correction Note', 'Clear Fields', 'Create', 'Save', and 'Close'. The browser window title is 'https://apps.dcf.wisconsin.gov/?action=CREATE&fromWhere=secondaryLinkSearch&ID_CASE=9223680'.

- Date:** The month that will count for the contact.
 - Contact by Designee** Check box: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.
 - Required Fields:**
 - Category:** Choose any (except Fiscal)
 - Type:** Must be 'Face to Face' (or 'Initial Face to Face' which is only available for the Initial Assessment or Ongoing Categories)
 - Face-to-Face Location:** Should be 'Out of Home Care' when visiting the child at the out of home placement.
 - Face-to-Face Result:** Must be 'Occurred' for the note to count as a face-to-face contact with a child placed in out of home care.
 - Participants:** The child(ren) that had face-to-face contact **MUST** be selected.
- To finalize the note, select the Note Finalized check box and click Save.